**An Example CRM Selection Checklist provided by Sugar CRM**

**(** [**https://www.sugarcrm.com/blog/2018/01/08/a-crm-evaluation-checklist-what-should-you-look-for/**](https://www.sugarcrm.com/blog/2018/01/08/a-crm-evaluation-checklist-what-should-you-look-for/) **)**

**1) CORE CRM FUNCTIONALITIES:**

**a) Sales Automation:**

1. What built-in capabilities does this solution provide for sales acceleration?
2. Does the solution auto-populate records and forms?
3. Can it ensure that contact data is accurate?
4. How does the solution drive sales productivity? Can it automate the delivery of information about companies and influencers in its dashboards?

**b) Lead Management:**

1. Does the solution come with functionality to automate prospect outreach and lead qualification?
2. What capabilities does it include for lead nurturing?

**c) Case Management and Self-Service:**

1. Does the solution deliver a comprehensive customer record to call center agents that includes data from the sales department?
2. Does the solution automate call and email routing to support prioritization and reduce wait times?

**2) IMPORTANT CRM FEATURES:**

**a) Workflow Automation:**

1. Does the solution automate workflows?
2. Does the automation support the entire customer journey, from acquisition to advocacy?
3. Does the solution offer automated call logging?
4. What skills do we need to customize workflows?

**b) Integration (Applications and Data Sources):**

1. How does this solution integrate with applications and data sources?
2. What integration capabilities are built-in?

**c) Usability/UX:**

1. Is the default user interface consumer-grade?
2. What work is involved in customizing an interface?
3. How consistent are the desktop and mobile interfaces?
4. Does the solution include offline mobile capabilities?

**d) Relationship Intelligence:**

1. Will the solution help us to accelerate call preparation time by providing associates with all the customer contact and social network information they need with just a name and an email?
2. Will the solution enable us to spend less time on research and maintenance so that we can spend more time getting to know our customers?

**3) PLATFORM REQUIREMENTS:**

**a) Customization and Extension Platform:**

1. How is the platform optimized for extensibility and customization?

**b) Code Base/Source Code Access:**

1. Does the solution provide access to the full source code?
2. Is the code base consistent across all modules?
3. Is the solution written in a proprietary language?
4. What expertise and tools will we need to customize the solution?

**c) Application Hosting:**

1. What are the options for hosting the application?
2. Can we choose where our data is stored?
3. Is there any charge for using local storage or a public cloud?
4. Is there a charge if we choose to relocate our data?

**d) Single- or Multi-Tenant Software:**

1. Do we have control of our own application version?
2. Do we schedule our own updates, or does the vendor set the migration schedule?

**4) SECURITY AND COMPLIANCE:**

1. Can this solution meet our data security and privacy requirements?
2. Does this solution enable us to meet our regulatory and compliance requirements?
3. Does this solution provide the governance tools we need?

**5) PRICING/TOTAL COST OF OWNERSHIP (TCO):**

1. What are the pricing models and levels?
2. Are there any up-charges, additional product charges, server license charges, or maintenance charges?
3. What other charges and fees might we incur over the lifetime of this solution?
4. Are there charges for usage above preset limits and for storage of files?
5. Are there charges for integrating applications and data sources?
6. Are there limits on API calls?

**6) VENDOR REQUIREMENTS:**

1. What type of customer support is included with the solution? Do they offer extended, phone-based technical support packages?
2. Do they provide a knowledge base, case portal, or other online resources?
3. How broad/deep is their ecosystem? Are they part of a wider network of deployment partners?
4. Do they offer packaged connectors to critical features?